Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network

Voluntary Report - public distribution

Date: 4/3/2003

GAIN Report #CH3019

China, Peoples Republic of

Fishery Products

Situation and Outlook

2003

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Report Highlights:
China's 2002 aquatic production should surpass 45 million metric tons (MMT) due to aquaculture improvements. China's 2002 import of aquatic products for both domestic use and re-export should surpass 2.49 MMT and US $2.27 Billion. 2002 exports aquatic products should surpass 2.09 MMT and US $4.69 Billion. Policy announcements by several Chinese government bodies leave uncertainty for the aquatic situation in 2003.

Includes PSD changes: No
Includes Trade Matrix: No
Unscheduled Report
Beijing [CH1], CH

Production

China's Ministry of Agriculture (MOA) Fisheries Bureau estimates 2002 aquatic production increased 3.9 percent over 2001. Official data from the Chinese government will not be available until June, however a quick calculation indicates that 2002 production data would be around 45.5 million metric ton (MMT). MOA Fisheries Bureau reports that 61% of China's production is derived from freshwater and seawater aquaculture. Also, the bureau reports that China accounted for 31% of world aquaculture production in 2002. The increases in aquaculture are aided by the government implemented zero growth goal for catch of freshwater and seawater aquatic species within China's territorial waters.

The MOA Fisheries Bureau launched an ambitious vessel scrapping plan in 2002 that would last for five years and result in the removal of approximately 30,000 vessels fishing in China's territorial waters. The MOA Fisheries Bureau was able to secure roughly US $ 33 million for each of the first three years of the plan from the Chinese Ministry of Finance. In 2002, the Fisheries Bureau reports that nearly 5,000 vessels were scrapped. Under the plan, shipowners negotiate the sale of their vessel to the provincial government fisheries bureau. If the first three years of the plan prove successful, the Fisheries Bureau will apply for additional funding from the Ministry of Finance for the remaining two years of the plan.

One of the biggest challenges for the project is finding and fostering alternative employment opportunities for fishermen in a country where high or rising unemployment is a significant concern. The Fisheries Bureau hopes that unemployed fishermen will turn to aquaculture or gain employment in the aquatic processing sector. As it stands now, however, fishermen often make more money on the sea and many food processing jobs are being taken by rural laborers from China's inland provinces at lower wages than the coastal workers are accustomed. Therefore, there has not been significant interest for many fisherman and/or boat owners to sell their vessels.

State-owned aquatic production has been declining for the last several years as many former state-owned companies become private or share-held ventures. So, rather than being a true production decline in state-owned resources, data from the new ventures' catch or culture is now captured under data for total aquatic production. The greater decline in state-owned seawater catch and culture would tend to indicate that those areas may be more advantageous private ventures. Whereas, the freshwater catch and culture production operations find it more profitable to remain under state protection.

Despite the decline of state-owned aquatic production, China's aquatic goods production has been increasing steadily due to freshwater and seawater aquaculture. The MOA Fisheries Bureau recently published a 5-year agriculture plan that includes a plan to encourage aquaculture production (see production policy, below). However, the Fisheries Bureau has recognized that with emphasis on aquaculture, there needs to be better management of large scale aquaculture centers and improved food and environmental safety enforcement. With these concerns in mind, MOA has developed a permit system for large aquaculture centers and continued partnering with other countries to develop advanced aquaculture systems.

One example of cooperation is the development and continued operation of four China-Japan aquaculture centers through the Overseas Fisheries Cooperation Fund (one center in Guangdong, Shandong, and two in Fujian). There is also significant cooperation among provincial ocean and fishery service centers and other nations or international organizations such as the World Bank.

In addition to the work being done by these aquaculture centers, the Chinese Academy of Fisheries Science began working with the U.S. Fish and Wildlife Service on a project to culture American Shad in China as a means to help replenish decimated Chinese stocks of Reeves Shad. The Fisheries Bureau also mentioned programs where aquaculture centers had imported Channel Catfish from the U.S., eel from France, and Tilapia stocks from European countries.

The Chinese government has implemented several measures to curb illegal, unregulated, and unreported (IUU) freshwater and seawater catch. Aside from the vessel scrapping plan, the government instituted a regulation that no new fishing vessels could be licensed unless another vessel license was revoked or a ship of equal capacity was decommissioned. Also, China has continued its no-catch periods in coastal waters and even extended some no-catch seasons on its domestic rivers and territorial waters. For example, the Chinese government reports that provincial authorities along the Yangtze River have implemented a successful no-catch season along the length of the river and that the no-catch season in China's coastal waters affects over 130,000 vessels and around one million fishermen. Furthermore, in November 2002, China conducted its first high seas boarding of a fishing vessel in the North Pacific. The Fisheries Bureau would like to continue this program in 2003, but as of yet, no further details are available.

A couple of China's deep water fishing operations report that they have lost their self-catch quota ability or have had their self-catch quota reduced. It appears that as China's fisheries enforcement has strengthened, several companies that used to be able to bring a portion of China's catch into the country tariff free no longer enjoy that privilege. Apparently some of the operations were purchasing aquatic products and storing them on their vessel (i.e. importing) and claiming the products were self-caught so that the companies could avoid paying tariffs on the imported products and at the same time fulfill their quota.

China's Aquatic Production (Unit: Metric Ton)				
Category	1999	2000	2001	2002
Total Aquatic Production	41,224,312	42,789,984	43,820,987	NA
-Seawater Aquatic Production	24,719,208	25,387,389	25,721,467	NA
--Seawater Catch	14,976,223	14,774,524	14,406,144	NA
--Seawater Culture	9,742,985	10,612,865	11,315,323	NA
-Freshwater Aquatic Production	16,505,104	17,402,595	18,099,520	NA
--Freshwater Catch	2,285,364	2,233,230	2,149,923	NA
--Freshwater Culture	14,219,740	15,169,365	15,949,588	NA
Source: Ministry of Agriculture 2002 Yearbook				

China's State Owned Aquatic Production (Unit: Metric Ton)				
Category	1999	2000	2001	2002
State Owned Aquatic Production	2,302,766	2,015,376	1,946,657	NA
-State Owned Seawater Production	1,162,966	868,428	784,801	NA
--State Owned Seawater Catch	908,935	667,957	613,102	NA
--State Owned Seawater Culture	254,031	200,471	171,699	NA
-State Owned Freshwater Production	1,139,800	1,146,948	1,161,856	NA
--State Owned Freshwater Catch	92,237	86,272	89,635	NA
--State Owned Freshwater Culture	1,047,563	1,060,676	1,072,221	NA
Source: Ministry of Agriculture 2002 Yearbook				

China's Seawater Aquatic Production (Unit: Metric Ton)				
Category	1999	2000	2001	2002
Seawater Fish Production	10,581,126	10,327,139	10,127,081	NA
Seawater Shrimp, Prawn, and Crab	2,770,805	2,970,083	3,022,022	NA
Seawater Shellfish	9,590,849	10,389,488	10,822,374	NA
Seawater Algae	1,194,393	1,221,988	1,241,497	NA
Seawater Other	582,035	478,691	508,493	NA
Source: Ministry of Agriculture Yearbooks				

China's Freshwater Aquatic Production (Unit: Metric Ton)				
Category	1999	2000	2001	2002
Freshwater Fish	15,168,961	15,786,943	16,304,522	NA
Freshwater Shrimp, Prawn, Crab	706,759	859,822	1,001,479	NA
Freshwater Shellfish	434,993	480,249	529,645	NA
Freshwater Other	194,391	275,581	263,874	NA
Source: Ministry of Agriculture Yearbooks				

Production Policy

China is still trying to finalize agreements on catching rights in shared territorial waters with Vietnam. According to the MOA Fisheries Bureau, both countries are in "near" agreement, but there are still points under negotiation. As for catching rights in shared waters with Japan, China and Japan reached agreement in June 2000 and both nations have a 5-year grace period before vessels are withdrawn from shared waters. In June 2001, China and South Korea reached a similar agreement.

MOA published a 5-year plan that emphasizes agricultural production for 11 different commodities where China possesses a comparative production advantage. One of the areas included in the 5-year plan was in aquatic production. The plan calls for those in the aquatic product sector to pay attention to food quality safety, breeding desirable varieties, developing high-value processing of aquatic products, and accelerating development of three advantageous geographic aquaculture areas that would help China be in a position to export more aquatic products. The plan mentions that China's aquatic producers should pay attention to healthy breeding methods and improving water quality, also.

The geographic areas included in the plan are: (1) China's eastern and southern coastal areas, (2)

the Yellow and Bohai Sea areas, and (3) the middle to lower reaches of the Yangtze River. The first area includes cities and counties in the provinces of Zhejiang, Fujian, Guangdong, Hainan, and Guangxi. Some cities and counties in these areas will be encouraged to produce eels, prawns, Tilapia, and large Yellow Croaker. The second area includes cities and counties in Shandong, Hebei and Liaoning provinces. Several cities in those provinces will be encouraged to develop prawn and shellfish culture. The third areas includes cities and counties in Jiangsu, Anhui and Jianxi provinces. Cities in these areas will be encouraged to give priority to developing fresh water crab aquaculture.

The MOA Fisheries Bureau would like to see that the fry/fingerling or juvenile aquatic species originate from already available resources at the nation's aquaculture centers and research stations. So, at the present time, there is no plan for the aquaculture centers or the state-owned fisheries to import any other products for culture.

Policy
Possibly, as a means to regulate an expected increase in imports and to control perceived problems with unregulated imports, China's General Administration of Quality Supervision, Inspection, and Quarantine (AQSIQ) issued two announcements (No. 31 and No. 888) (GAIN reports CH2061 and CH3007) regarding the storage, trading, inspection certificates, and packaging of entry and exit aquatic products. These announcements place new burdens on imports and exports of aquatic products (including direct imports and imports for processing and re-export).

Announcement No. 888 delayed implementation of the regulation until June 30, 2003. As of mid-March 2003, many trading and processing companies were unaware of the announcements and the impact that enforcement would have on normal trade relations. The few traders and processing companies aware of the announcements believe that enforcement during calendar year 2003 will not be adhered to strictly and that full enforcement will begin in 2004. At this time, the U.S. Government still intends to discuss the announcements with the Chinese government.

Also, in the last few months of 2002, China's Ministry of Health (MOH) issued DRAFT versions of several "National Standards" of food safety and hygiene for aquatic products. MOH is responsible for the food safety and sanitation of food and agricultural products that are sold or distributed within China. The drafts relevant to aquatic products are:

GB 2733	Hygiene Standard for Fresh and Frozen Marine Products
GB 10132	Hygiene Standard for Minced Aquatic Products
GB 10133	Hygiene Standard for Aquatic Products as a Flavoring
GB 10136	Hygiene Standard for Salt and Liquor Saturated Aquatic Products
GB 10138	Hygiene Standard for Salted Fish Products
GB 10144	Hygiene Standard for Dried Aquatic Products
GB 14939	Hygiene Standard for Canned Fish Products
GB XXXX	Hygiene Standard for Marine Algae and Algae Products
GB 9674	Maximum Levels of Polychlorobiphenyls (PCBs) in Sea Foods

Once final versions of these drafted Standards are released, they will substitute and annul

previous regulations. The DRAFT versions of the regulations are available in Chinese at the MOH website: http://www.moh.gov.cn. The Agriculture Affairs Office at the U.S. Embassy in Beijing and the USDA Office of Food Safety and Technical Services (OFSTS) in Washington, D.C. have UNOFFICIAL translations available and intend to publish the material in several GAIN reports. At this time, interested U.S. parties can submit comments on the drafted regulations to the Agricultural Affairs Office or USDA OFSTS. It appears that these MOH standards are for aquatic products being sold or distributed on the domestic market and not for products being processed and re-exported.

In 2002, also, MOA started drafting the "National Action Plan for China's Aquatic Organism Source Protection." The plan will identify principle species and provide targets along with an action plan and implementation measures to protect China's aquatic resources, aquatic animals and plants, as well as ecological environments around fisheries.

Consumption

China's MOA Fisheries Bureau is concerned that consumption estimates by China's State Statistic Bureau may not accurately reflect Chinese consumption patterns of aquatic products. The concern is that consumption data should be significantly higher (maybe as great as 30 kilograms per capita). However, due to distinctions between food use and total use (including food and feed use) and aquatic product use for processing or trade, there is an abundance of contradictory data.

Clearly, however, aquatic product consumption is rising as consumers around the country have developed a more varied diet and there is improved cold storage and distribution from coastal China and interior riverways along with sea or airports to China's interior and more geographically isolated locations. Also, China's population is becoming more traveled and as Chinese visit larger cities or coastal areas, they are exposed to a wider range of aquatic products.

The State Statistics Bureau (SSB) reports 2001 per capita consumption of aquatic products at 12.3 kilograms in urban areas and 4.12 kilograms in rural areas. Per SSB data, urban consumption of aquatic products has increased 24 percent since 1996 whereas urban consumption of pork, beef, and lamb has declined 6 percent. Rural consumption of both aquatic products and pork, beef, and lamb has increased 10 percent and 11 percent respectively since 1996 (see table below).

Per Capita Consumption Trends for Aquatic Products							
	1996	1997	1998	1999	2000*	2001**	2002
Urban	9.3	9.3	9.8	10.3	11.7	12.3	NA
Rural	3.68	3.75	3.66	3.82	3.92	4.12	NA
Per Capita Consumption Trends for Pork, Beef, and Lamb							
Urban	20.4	19	19.2	20	20	19.2	NA
Rural	12.9	12.72	13.2	13.87	14.41	14.5	NA

* Urban Population of 459.06 million. Rural Population of 808.37 million.
** Urban Population of 480.64 million. Rural Population of 795.63 million.
Source: 2002 China Statistical Abstract pages 6, 93, and 98

From the table above, consumption of aquatic products is around 3 times greater in urban areas than in rural areas. The SSB also provides information on Per Capita Annual Living Expenditures of Urban Residents and Disposable Income by Region. In 2001, China's nationwide average per capita expenditure on aquatic products was Chinese RMB 151.99 (RMB 8.265 equals US $1.00) from an average per capita disposable income of RMB 6859.58. The chart on the following page lists the ten areas with the greatest per capita annual expenditures on aquatic products and the disposable income value for those areas.

Per Capita Annual Living Expenditure of Urban Residents by Region in 2001

Region	Aquatic Product Expenditure Rank	Aquatic Product Expenditure RMB Value	Disposable Income Rank	Disposable Income Value
Shanghai	1	623.84	1	12,883
Fujian	2	472.35	6	8,313
Zhejiang	3	412.88	3	10,465
Guangdong	4	338.43	4	10,415
Hainan	5	289.33	19	5,839
Tianjin	6	257.55	5	8,959
Jiangsu	7	231.74	8	7,375
Nationwide Average	NA	151.99	NA	6,860
Liaoning	8	147.75	20	5,797
Beijing	9	144.33	2	11,578
Guangxi	10	128.55	13	6,666

Source: 2002 China Statistical Yearbook Table 10-15,10-16

Of China's 31 reporting provinces and municipalities, only seven areas had aquatic product expenditures above the national average. However, nine of the top ten areas with the greatest expenditure on aquatic products are coastal areas that have a strong familiarity with aquatic products. Also, most of the urban residents represented in the territories and regions in the above table are among those with the highest disposable incomes in China.

When purchasing aquatic products, Chinese consumers tend to prefer live product to fresh product and fresh product to frozen product. Most urban and rural restaurants keep "live wells" or "fish tanks" that allow patrons to choose their own fish, shrimp, crab, turtle or other aquatic species when dining out. Dining out, however, is still considered expensive by some, so many consumers in coastal areas or large urban centers may visit modern hyper markets or wet markets to purchase live and fresh fish. In these areas, it is not uncommon for shoppers to visit hypermarkets or wet markets as many as three times a week to buy fresh products. In areas where there are not any hypermarkets, consumers may visit the aquaculture ponds or tidal pools to purchase live fish and other aquatic products.

Marketing

It appears most Chinese importers and processors of aquatic products still tend to sell their product to the Chinese market through distributors and wholesalers rather than directly to hotels, restaurants, or retail sales outlets. However, one ambitious trader and processor is working on developing branded products that can bypass wholesalers and go directly to the HRI sector in China. The trader and processor believes, although demand is small, there is adequate demand for branded and packaged frozen products on the Chinese market. The trader and processor perceives that habits are changing in some sectors of Chinese society and that people are beginning to opt for greater convenience and will consume packaged seafood products more readily in the future. Other companies have also sought cooperation with restaurants or they have invested in restaurants that carry the company name and the companies' products.

China is a large country with a great diversity in taste and preference for aquatic products. It appears as if most retail outlets throughout China try to make sure that the bulk of their business is with local product. For example, one hypermarket in North China routinely has over 20,000 customers pass through its doors each day. In the space of the hypermarket for fresh aquatic product sales, about 90% of the product was domestic and of that product, around 70% was from local area waters. These local products are familiar to most consumers palates and the consumers are familiar with how the food can be prepared and what the food can accompany.

Although many Chinese consumers are health conscious and want to purchase the most wholesome products, one large seafood importer said that, when her company sells imported salmon to wholesalers, many wholesalers do not care if the product was fresh caught or farm raised. In general, however, many traders hold positive perceptions when hearing that much of the U.S. aquatic products are "wild-catch". Most often, though, the more important item for the wholesaler was color, appearance, and pricing.

Several of the traders report that frozen imported products, like many products imported from the U.S., probably have a better potential in larger cities in North and Northeast China rather than large coastal areas that enjoy fresh product.

In 2003, there will be the first China Seafood Exposition in Shanghai from August 27-29 and at the end of October, there will be the Eighth China Fisheries and Seafood Exposition and Aquaculture China Exhibition in Shanghai. This show had been held in Qingdao for the last two years, but has decided to change venues for this year. Several Chinese and international traders and processors have said that they intend to go to both shows. However, many will just be spectators at the August show while almost all intend to exhibit at the October show.

As for other nation seafood shows, many Chinese importers express a familiarity with the International Seafood Show in Boston and find the event very helpful. Recently, many Chinese traders and processors mentioned that they had little interest in attending events at which there were mainly European representatives. This is due to the problems that Chinese seafood exports have had in the European Union.

Several traders report there is still a need for more frozen Pollock, Pacific Cod, Halibut and other fish for processing and re-export as many processing operations are running well below capacity. In addition, traders report there is still a market for some products like whole and round Yellow Croaker as well as Turbot fish heads. Crab shipments to China have had significant increases over the 2002 calendar year. Also, Loligo Squid remains a welcome product on the Chinese market, however, due to decreased populations prices have risen and many importers and processors report their margins are not as great as in previous years.

Trade

China Customs allows for a classification that incorporates "normal" trade whereby tariff and VAT rates are applied to imported products and also a two-tiered system for bonded processing and re-export trade where products enter China tariff and VAT free for processing on behalf of a foreign customer or the products enter China for a domestic enterprise and are processed and re-exported. Under processing and re-export trade, the portions of the products that remain in the country are supposed to be assessed tariff and VAT charges.

2001 Trade

The 2001 import volume of aquatic products (excluding fishmeal) was 1.412 MMT (including both bonded and "normal" trade). Of the imports, 902,000 MT or 65.8% was for bonded processing and re-export trade. Of the total 1.412 MMT, about one-quarter of the products (350,000 MT) were considered "edible aquatic products" that did not require additional processing (a decrease of nearly 70,000 MT from CY 2000). Of the "edible aquatic products" that were imported in 2001, the most actively traded varieties included "hairtail" or "ribbon fish", shrimp and prawns, along with salmon. The Fisheries Bureau also indicates that China imported 87,000 MT of frozen hairtail, 55,000 MT of frozen shrimp and prawns, 36,000 MT of frozen Tilapia, and 1,543 MT of fresh or chilled salmon.

The MOA Fisheries Bureau trade data for 2001 indicates that "normal" exports of all aquatic products (human consumption and other use) comprised 62% of total aquatic product export trade by value, while bonded and "normal" processing and re-export trade comprised the remaining 38%. This equates to roughly 1.392 MMT and US $2.54 Billion in normal exports and 552,000 MT and US $1.56 Billion in bonded processing and re-export trade (combined trade of 1.994 MMT and US $4.1 Billion).

Of the "normal" exports in 2001, nearly 40% were from aquaculture resources and the remaining 60% were from catch. According to the Fisheries Bureau, the most widely traded aquaculture variety among Chinese exports was roast eel at nearly 73,000 MT and valued at nearly US $620 million. Following roast eel exports, the Fisheries Bureau reported exports of 20,000 MT of cultured Tilapia, and 70,000 MT of cultured shrimp and prawn (of which, 97% was from seawater and 3% from freshwater aquaculture).

2002 Trade

China's 2002 imports of all aquatic products (human consumption and other use), according to a March 5, 2003 report by the MOA Fisheries Bureau, were 2.49 MMT and valued at US $ 2.27 Billion. Excluding fishmeal, China imported roughly 1.554 MMT of aquatic products in 2002. This was an increase of roughly 9.1% by volume (or 142,000 MT) over 2001 trade. The 1.554 MMT of aquatic products imported in 2002 includes 936,000 MT of bonded aquatic products for processing and re-export (roughly 60% of all imported aquatic products in 2002).

In 2002, China's aquatic exports comprised the greatest share by value of China's food and agricultural product exports for the third consecutive year. A report by MOA on March 5, 2003 indicates that 2002 aquatic product exports were 2.09 MMT and US $4.69 billion. This was an increase of 6.8% by volume and 12.1% by value from calendar year 2001. A Fisheries Bureau official indicated that the trade surplus for aquatic products accounts for around 9% of the countries total trade surplus.

Imports

Many importers have a favorable impression of U.S. product; however, they often perceive that U.S. prices are not priced well for the China market. Possibly, for that reason, Russia has been the largest supplier of aquatic products to China for several years. China's importers and processors expect that the supply of products from Russia will continue to rise in 2003 and expect that Russia will allocate up to 20% more of its catch for sale to China. Thus, Russia will likely remain an inexpensive supplier of product to Chinese processors who, in-turn, re-export the product overseas. Although imports from Russia remained dominant, perhaps the largest overall change in the supply of imported product from 2001 to 2002 was the notable rise of imported aquatic products (namely from HS Code 0307) from North Korea.

Trading offices and processing companies expect greater imports from other nations in the future due to continued restrictions on domestic catch and greater concerns about the impact of unregulated aquaculture centers on the environment. Traders and processors also expect that lower tariff rates that were implemented following China's accession to the World Trade Organization will help spur imports. However, many do not expect that lower costs will passed on to distributors, wholesalers, retailers, or consumers in the near future. Traders and processors caution, however, that increased imports may slow or reverse several years from now if the 5-year plan to increase national aquaculture production continues and a distribution mechanism for those products is created.

In theory, Chinese importers are supposed to apply for an import inspection permit from the Customs, Inspection, and Quarantine (CIQ) office at their port of entry prior to product arrival and completion of trade contracts. This application is then forwarded to the AQSIQ office in Beijing, processed, and returned to the CIQ office and importer. This process is similar for other animal protein products like meat and poultry and has been a point of contention between the government and the trade. The one exception with aquatic products is that, until now at least, importers can bring their application to the CIQ Qingdao office (due to the large number of processing and re-export operations in Qingdao) which can then approve the inspection permit application without having to be processed in Beijing and the added time delay.

Exports

According to China Customs data, principle export destinations include East Asia (Japan, South Korea), the European Union, and the United States. However, 2002 trade to EU member countries and South Korea declined from 2001. The Fisheries Bureau reports that in 2002, China became the largest exporter by volume worldwide of aquatic products thus continuing their steady improvement from number two in 2001 (#1-Thailand) and number three in 2000 (#1-Thailand, #2-Norway).

Despite the improved export situation, China's aquatic product exports have faced several problems over the last few years. MOA states the problems for exports have been tied to a poor food quality safety record, having few desirable domestic high-value products, and a poorly developed processing and distribution sector.

The most widely recognized problem has been the presence of the antibiotic Chloramphenicol (CAP) in aquatic product shipments. Findings were widespread enough that the European Union banned all aquatic product exports from China as it has a zero tolerance. Since that time, however, the European Union began backing away from the complete ban of Chinese aquatic exports and now allows some products caught at sea to be exported to EU member countries.

In addition to the EU CAP problems, the U.S. FDA has found some shipments of Chinese aquatic products positive for CAP and, in turn, placed restrictions on those plants where the products originated (see FDA website: www.fda.gov/ora/fiars/ora_import_ia16124.html). Even though FDA uses a plant-by-plant system for detention without physical examination, many Chinese trading firms report a reluctance to export products from unknown or unaffiliated processors. In addition to foreign nations' CAP restrictions, China's AQSIQ has now mandated that aquatic products be tested for CAP. Also, it appears the MOA Fisheries Bureau is working with China's AQSIQ and Ministry of Foreign Trade and Economic Cooperation (MOFTEC) to try and align an internationally accepted standard for CAP and other residues.

Exports of eel and processed eel products to Japan, Korea, and neighboring countries and territories has been strong as have exports of highly processed products like frozen fish fillets.

Some of the data in the following tables may not coincide with the above commentary due to recording differences between China Customs and the MOA Fisheries Bureau.

China's Imports of Aquatic Products (including HS Codes 03, 1604, 1605) by Country of Origin (Volume: MT) (Value: Million USD)

		2000		2001		2002	
Rank*	**Country**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
1	Russia	487,221	346	527,977	488	565,813	622
2	Korea, North	6,342	4	36,617	48	117,248	143
3	United States	93,456	80	115,706	100	112,496	106
4	India	130,606	84	113,481	78	84,878	50
5	Japan	47,193	137	77,747	107	65,532	100
6	Norway	36,632	42	65,662	64	60,751	64
7	Canada	35,240	77	40,215	64	47,843	80
8	New Zealand	26,131	26	31,579	27	44,140	38
9	Korea, South	62,254	67	46,018	45	41,213	39
10	Thailand	50,329	41	28,700	27	30,214	24
Others		275,614	313	263,879	289	282,005	307
Total		1,251,017	1,217	1,347,581	1,338	1,452,132	1,574

Source: World Trade Atlas (China Customs)
*Rank Order by 2002 Volume

China's Imports of Aquatic Products (including HS Codes 03, 1604, 1605) by Chinese Port/City (Volume: MT) (Value: Million USD)

		2000		2001		2002	
Rank*	**Port/City**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
1	Qingdao	551,805	549	680,029	723	717,556	855
2	Dalian	265,239	241	308,249	284	379,401	390
3	Shanghai	80,760	98	100,733	90	102,345	87
4	Shenzhen	44,653	59	42,797	32	57,617	39
5	Ningbo	40,548	40	36,965	35	35,583	34
6	Tianjin	32,481	42	28,485	34	28,764	31
7	Fuzhou	34,785	23	25,467	20	23,015	13
8	Nanning	336	1	5,000	2	18,485	6
9	Xiamen	29,175	16	16,872	6	16,487	6
10	Changchun	5,717	3	7,502	4	15,510	12
Others		165,518	145	95,483	108	57,369	101
Total		1,251,017	1,217	1,347,581	1,338	1,452,132	1,574

Source: China Customs
*Rank Order by 2002 Volume

China's Import of Aquatic Products by Calendar Year (Volume: MT) (Value: Million USD)							
		2000		2001		2002	
HS	Description	Volume	Value	Volume	Value	Volume	Value
0301	Fish, Live	1,253	51	1,979	12	1,708	17
0302	Fish, Fresh	6,430	14	5,791	13	8,322	21
0303	Fish, Frozen	889,777	685	976,440	853	990,048	1,004
0304	Fish, Fillet	15,051	24	25,001	39	12,796	23
0305	Fish, Dried, Salted, Brined	8,832	41	7,978	28	18,038	35
0306	Crustaceans	80,427	216	84,737	194	91,693	191
0307	Mollusks & Other	246,591	182	242,104	193	323,859	273
1604	Fish & Caviar, Prepared or Packaged	924	2	1,468	3	1,304	2
1605	Crustaceans, Mollusks, & Other Prepared or Packaged	1,732	3	2,084	3	4,363	7
Source: China Customs							

China's Imports of Frozen Fish (HS 0303) by Country of Origin
(Volume: MT) (Value: Million USD)

		2000		2001		2002	
Rank*	**Country**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
1	Russia	476,538	332	516,090	469	546,969	604
2	India	113,971	57	98,980	48	73,144	31
3	United States	44,136	39	55,872	53	65,686	71
4	Norway	34,888	35	64,082	57	58,843	57
5	Japan	25,855	49	40,558	60	42,587	68
6	New Zealand	22,186	21	28,070	22	33,249	27
7	Netherlands	12,119	7	46,310	24	16,854	10
8	Thailand	31,985	16	14,347	7	16,609	7
9	Indonesia	17,875	9	10,833	10	13,021	5
10	Iceland	8,908	9	12,979	15	10,833	11
Others		101,315	110	88,318	86	112,252	113
Total		889,777	685	976,440	853	990,048	1,004

Source: World Trade Atlas (China Customs)
*Rank Order by 2002 Volume

China's Imports of Frozen Fish (HS 0303) by Chinese Port/City
(Volume: MT) (Value: Million USD)

		2000		2001		2002	
Rank*	**Port/City**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
1	Qingdao	450,649	396	566,662	567	585,970	688
2	Dalian	188,998	141	206,201	154	216,133	186
3	Shanghai	38,769	25	61,281	25	66,925	36
4	Shenzhen	27,131	13	30,635	16	44,799	20
5	Tianjin	24,366	30	21,010	24	20,366	20
6	Changchun	5,115	1	5,935	2	10,338	5
7	Harbin	20,752	4	20,858	7	10,109	4
8	Hangzhou	406	0	1,562	1	6,991	8
9	Fuzhou	15,766	10	9,296	6	5,556	3
10	Ningbo	15,472	8	14,108	11	5,495	4
Others		102,353	56	38,894	41	17,366	30
Total		889,777	685	976,440	853	990,048	1,004

Source: World Trade Atlas (China Customs)
*Rank Order by 2002 Volume

China's Imports of Crustaceans (0306) by Country of Origin
(Volume: MT) (Value: Million USD)

		2000		2001		2002	
Rank*	**Country**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
1	Canada	29,389	68	30,936	51	36,449	62
2	Denmark	6,334	9	6,166	7	12,601	13
3	Greenland	2,771	5	5,640	10	6,939	11
4	North Korea	382	2	1,880	8	5,838	23
5	Thailand	9,918	17	7,041	15	4,907	10
6	India	6,367	21	6,864	24	4,156	13
7	Japan	4,273	24	3,843	43	2,833	10
8	United States	1,758	8	2,122	10	2,470	10
9	Australia	1,610	9	3,513	13	2,447	7
10	Estonia	334	0	1,157	1	2,229	2
Others		17,293	53	15,576	11	10,814	29
Total		80,427	216	84,737	194	91,693	191

Source: World Trade Atlas (China Customs)
*Rank Order by 2002 Volume

China's Imports of Crustaceans (0306) by Chinese Port/City
(Volume: MT) (Value: Million USD)

		2000		2001		2002	
Rank*	**Port/City**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
1	Qingdao	22,352	66	28,853	70	30,261	64
2	Shanghai	18,945	30	17,443	30	17,678	26
3	Dalian	14,600	54	11,405	44	13,472	56
4	Ningbo	5,733	19	6,055	10	13,071	15
5	Tianjin	2,751	5	6,179	6	4,312	7
6	Shenzhen	4,588	10	2,852	8	2,661	7
7	Changchun	307	2	925	2	2,465	2
8	Nanjing	0	0	273	0	1,300	1
9	Kunming	357	0	966	2	926	1
10	Beijing	150	1	628	2	745	2
Others		10,645	29	9,157	21	4,802	10
Total		80,427	216	84,737	194	91,693	191

Source: World Trade Atlas (China Customs)
*Rank Order by 2002 Volume

China's Imports of Mollusks and Other (0307) by Country of Origin (Volume: MT) (Value: Million USD)

		2000		2001		2002	
Rank*	**Country**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
1	North Korea	1,173	1	33,525	38	106,687	111
2	United States	43,173	25	48,797	25	42,193	21
3	South Korea	49,594	47	33,103	30	30,302	21
4	Argentina	27,714	13	16,924	12	19,685	14
5	Peru	3,204	2	2,939	1	19,641	11
6	Japan	11,965	14	29,963	22	16,274	15
7	Russia	6,054	5	2,429	3	15,314	11
8	Taiwan	48,329	23	28,961	16	14,845	6
9	Vietnam	483	1	4,173	3	8,461	6
10	New Zealand	1,188	1	1,877	1	7,450	5
Others		53,713	50	39,412	41	43,006	54
Total		246,591	182	242,104	193	323,859	273

Source: World Trade Atlas (China Customs)
*Rank Order by 2002 Volume

China's Imports of Mollusks and Other Aquatics (0307) by Chinese Port/City (Volume: MT) (Value: Million USD)

		2000		2001		2002	
Rank*	**Port/City**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
1	Dalian	56,496	38	83,014	73	143,861	133
2	Qingdao	70,248	69	69,255	62	90,144	81
3	Fuzhou	17,761	10	14,227	8	16,153	8
4	Shanghai	19,633	16	18,161	12	15,899	10
5	Ningbo	19,139	12	15,487	11	15,587	13
6	Xiamen	27,820	9	15,372	5	12,922	4
7	Shenzhen	7,382	6	5,503	4	5,667	5
8	Nanning	90	0	2,140	1	5,287	2
9	Hangzhou	9,125	6	7,881	5	5,150	4
10	Tianjin	4,955	5	1,039	3	3,940	3
Others		13,941	10	10,026	9	9,251	9
Total		246,591	182	242,104	193	323,859	273

Source: World Trade Atlas (China Customs)
*Rank Order by 2002 Volume

China's Export of Aquatic Products by Calendar Year (Volume: MT) (Value: Million USD)							
		2000		2001		2002	
HS	Description	Volume	Value	Volume	Value	Volume	Value
0301	Fish, Live	97,627	123	105,925	166	114,186	169
0302	Fish, Fresh	60,851	121	66,656	139	74,938	155
0303	Fish, Frozen	379,053	412	621,132	530	542,817	485
0304	Fish, Fillet	342,009	654	387,196	789	419,710	929
0305	Fish, Dried, Salted, Brined	14,026	110	16,193	101	24,802	133
0306	Crustaceans	94,076	413	106,344	402	122,000	443
0307	Mollusks & Other	223,534	437	256,839	467	350,913	562
1604	Fish & Caviar, Prepared or Packaged	151,055	933	186,363	858	187,834	866
1605	Crustaceans & Mollusks, Prepared or Packaged	111,968	457	133,107	568	160,125	762
Source: China Customs							